The different ways to create a job 1. Creating a job

There are different ways to create a job in PlanManager. Assume that a job is a damage on a car! Here are the different possibilities to create a new job in PlanManager:

1.1 Manually in PlanManager

1.1.1 First way

The first way to create a new job in PlanManager is by clicking on the 'New' button in the top left of your job list.

PlanManager					Help] w	orkshop	Job	Planning	Report	Maintenance	System Ca	r Fleet Ir	voicing
Back Job List Order list Deliver	ries (Offer Re	quests S	Stock Scale	e Vat Bool	k DMS	Albatros	Carpass /	Audatex		· ·	E	glish (United Kingo	lom) 🔽 🕻
Reset Export		Nev	v	59 items									Previous 1	2 Next
🌣 Filter	*		Job •	Location		Key Tag	Audatex	Creation D	ate Book in dat	te Make	Model	Registratio	on Owner	s
select a location	*	Ď	150059 /	All Car Repai	ir :	7	SW000026	5 16-07-201	7 13-07-2017	7 VW	GOLF	ABC123	Hancock	A
type a claim number	*	ď	150058	Demo Repar	Services			15-07-201	7	MERCED	ES-BENZ C200	MGC1234		N
type a registration	*	ď	150057 (Demo Repair	Services		SW000002	2 19-06-201	7			AZERTY	Dean Welle	r N
type a person name	*	ď	150056	Demo Repair	Services		sw000002	2 19-06-201	7			AZERTY		D
type a model name	*	ď	150055 (Demo Repair	Services		SW00000	19-06-201	7			GV07ZWT		Ν
type a moder name	*	ď	150054 (Demo Repair	Services		SW000024	19-06-201	7			1ABC123		N
type a make name	×	ď	150053	Demo Repair	Services		SW00000	31-05-201	7 31-07-2017	7, 10:19 AUDI	A4 AVANT	GJ58 AAB	Owner	F
type a key tag number	\propto	ď	150052	Demo Repair	Services		SW000025	5 31-05-201	7	FIAT	UNO VAN	1ABC123	VERVAEKE I	KRIS N
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∃Advanced	*	ď	150049				SW000004	\$ 27-02-201	7	ALFA RO	MEO 145 145	CLOV 1ABCTEST		N

In order to create a new job, it takes at least the license plate of the vehicle as well as the location (if you are working on a PlanManager with several locations). Then click on the little floppy down right in order to save this file.

PlanManager	Help	Workshop Job Planning	Report I
Back Job List Order list Deliveries Offer Requests Sto	ck Scale Vat Book I	OMS Albatros Carpass Audatex	
• Job #			
Location Demo Repair Services 👤	Key Tag Number		
Registration EXAMPLE1	Incident date		
Make	Est Appointment / in		
Model	Book in date		
Туре	Vehicle In		
Model year	Vehicle In date		
VIN/Code E.1	Ready to start		
Colour	Planning	Unknown → Unknown	
Mileage Start / Finish /	Start / End	Unknown → Unknown	
First registration	Est Comp Date		
Vehicle details	Client informed		
Comments / Damage	Off site date		
	Current Staus Status	Unknown New	

Once registered, your file will make a file number (which follows the last number of



your job list), and additional information to the file screen will appear.

1.1.2 Second way

When you are on your list of jobs, if you introduce a license plate in the PlanManager filter that is not known, you will see the following screen:

PlanManager			Help	1	Workshop	Job		Planning	Re	port	Mainte
Back Job List Order list Deliver	ries Offer Requests	Stock Sca	ale Vat Book	DMS	Albatros C	arpass	Audate	(•
Reset Export	New	Results: N	No items found.								
🌣 Filter	🏶 Job - L	ocation K	Cey Tag 🛛 Aud	datex	Creation I	Date	Book i	n date I	Make	Model	Registra
select a location	No results found	Create a new	claim with licens	eplate E	EXAMPLE2						
type a claim number											
EXAMPLE2											
type a person name											
type a model name											

When you click on the button "create a new claim with license plate XXXXXX" PlanManager will directly take this license plate to create a new job. (Same procedure as before if you work with different locations).

1.2 Manually from the app Inspector

If you use the Inspector app, you can create your new jobs directly from your mobile device (mobile phone, Tablet, camera...).

Click the Inspector application



When you open the app, you will get a screen similar to this:

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File		Export selected files	Remove selected files	Options
Select all	Q Filter			

Click on the 'File' button at the top left and you will get a new window:

				* 常 71% 🖬 12:11
+ File		Export selected files	Remove selected files	Options
Select all	Q Filter			
			Vehicle	
		⊙ Ba	ircode	
		Search (ir	nternet required)	
		Import (ir	iternet required)	
		O O	Close	
	[∀] Scrollen door afbeelding	Tekenen	Bijsnijden	ංද Delen

Click the "New vehicle" button to create a new job.

Then enter the license plate. You also have the option to scan the QR code that is located on the certificate of registration of the vehicle owner. To do this, press the button "Scan QR code" and place the red line that will appear above the QR code on the certificate.

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Reference:	Manually enter number		
Licenseplate:	EXAMPLE2	Scan	
Make	Make		
Model	Model		
Colour:	Colour		
Mileage:	Mileage		
Vin:	Vin	Scan	
Owner	Owner		
Phone:	Phone		
Email:	Email		
Driver:	Driver		
Phone:	Phone		
Email:	Email		
Remarks:			

Complete the additional data in the job. The most important is the chassis number, you can scan the barcode located on the certificate of registration. For this click on the 'Scan bar code' button and place the red line above the bar code.

You will be able to take a series of photos by clicking on the camera icon.

☑ <u>↑</u> ⊭	★ 😤 70% 💼 12:19
Colour:	Colour
Mileage:	Mileage
Vin:	Vin Scan
Owner	Owner
Phone:	Phone
Email:	Email
Driver:	Driver
Phone:	Phone
Email:	Email
Remarks:	
Pictures:	· O
	Save C Delete Export

Once you have the necessary data, you click on the "Export" button in order to send all the data filled in PlanManager (to be able to click on the "Export" button, you need an internet connection).

You will now see on your Inspector app that the file has been exported, and you can see the job in PlanManager..

2. First contact with the customer

A customer comes to the reception desk with his vehicle damaged for a quote. How to proceed in PlanManager?

First, we need to check if the vehicle is known in the system.

Tab - Menu list jobs: enter the license plate (or part) and hit the < Enter > key:

PlanManager							F	lelp		Wor	kshop	Job		Planning
Back Job List	Order list	Deliveries	5	Offer Re	quests	Stock	Scale	Vat Bool	k DI	MS	Albatros	Carpass	Auda	tex
Reset	E	cport		New	,	60 ite	ems							
🌣 Filter			幹		Job -	Locati	on	I	Кеу Т	ag A	Audatex	Creation [Date	Book in date
select a location		-	×	ď	150060	Demo	Repair S	ervices				05-08-201	7	
type a claim number			×	ď	150059	All Car	Repair	:	7	S	w000026	16-07-201	7	13-07-2017
type a registration			×	ď	150058	Demo	Repair S	ervices				15-07-201	7	
type a person name			×	ß	150057	Demo	Repair S	ervices		S	w000002	19-06-201	7	
			×	பு	150056	Demo	Repair S	ervices		S	w000002	19-06-201	7	
type a model name			*	ß	150055	Demo	Repair S	ervices		S	w000001	19-06-201	7	
type a make name		_	*	பு	150054	Demo	Repair S	ervices		s	w000024	19-06-201	7	
type a key tag number			*	ß	150053	Demo	Repair S	ervices		S	w000001	31-05-201	7	31-07-2017, 1
type a VIN number			*	பு	150052	Demo	Repair S	ervices		s	w000025	31-05-201	7	
type a repairer name			*	ß	150051					s	w000005	03-03-201	7	
			*	D)	150050					s	w000009	03-03-201	7	
			14	ŝ									-	

If the vehicle is known, the file(s) will be displayed in the list. If it is unknown, the list will be empty and you will need to create a new job.

3	Reset Export		Nev	v	1 items								
	🛱 Filter	\$₽		Job -	Location	Key Tag	Audatex	Creation Date	Book in date	Make	Model	Registration	Owner
	select a location	*	ď	150042	Demo Repair Services		9754294	24-11-2016		OPEL	VIVARO	1BJH562	VANDOORNE
	type a claim number												
	bjh 3 Characters are enough lidenseplate	to find i	the										

- a. The 3 possible scenarios
- i. There is no record in PlanManager for the vehicle.
- 1. Without the Inspector application

If you do not have our App, note paper (s) damage (s) information and take the necessary pictures. After that, create a new job in PlanManager (by clicking the "New" button at the top of the list of jobs) and retype the information collected - brand, model, chassis number, description of the damage and the owner (and if different from the owner, the driver also). Print the "Repair agreement" and make the customer sign - to do so, click the button with the printer, and select the

Back Job List On	der list Deliveries Offer Requ	ests Stock	Scale \	Vat Book	DMS	Albatros	Carpass	Audatex	
Job # 150	0042			2	Î			0	(
•				°" 🗊	Repair a	areement	Document	a Communicatio	
Location	Demo Repair Services		Key Tag Nu				-		
Registration	1BJH562		Incident d	a 💷	Checklis	t insurer			
Make	OPEL		Est Appoir	nt 📖	Estimate	evnert			
Model	VIVARO		Book in da	at a	Counter	- capere			
Туре			Vehicle In		Repair o	rder			
Model year			Vehicle In	date				0	
VIN/Code	W0LF7BHB6BV643201 E.1		Ready to s	start				0	
Colour			Planning		Unkr		oknown		

document in the drop-down menu.

Once the customer has left, you can continue to complete the electronic record in PlanManager by importing pictures into the new job. For this click on the button Strana 6 / 8

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'documents':



Then select the pictures by clicking on the 'Add files' button (1) of the window that opens:

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	Documer	nts								×	Dam
ļ	Doc box								Sho	w In ATR	(
	$\mathbf{+}$	Select file	e uploa	d queue	and click the	e start button.	Using	runtime:) (
	Filenan	ne					html5	Size	Status		(
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					Drag fi	iles here.					
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5	C Adv		artunio	be				0.6	0%	~	
-			artapio					0.5	0.10		
1											

When the list is complete, click the "Start upload" button (2). This will import the pictures in the jobfile.

2. With the Inspector app.

If you have our App "Inspector" on tablet or smart camera, create a new job on the Tablet by introducing at least the license plate of the vehicle, take pictures (take pictures of documents also!) and export it to PlanManager. Complete the PlanManager job and enter make, model, chassis number, description of the damage and the owner (and if different from the owner, the driver also). Print and sign the customer repair agreement - click the button with the printer and select the document in the menu drop-down:

II. There is a job for this vehicle and this damage(s) in PlanManager.

The existence of a job for the vehicle and the damage in question is explained by the fact that we have an audatex and that it was imported in PlanManager, or because a job has been created manually.

1. Without the Inspector application

If you do not have our App, note paper (s) damage (s) information and take the necessary pictures. Then fill in PlanManager job checking the info collected on the damage(s), the vehicle and related parties. Print and sign the customer repair agreement - click the button with the printer, and select the document in the menu drop-down. Once the customer has left, you can continue to complete the electronic record in PlanManager by importing pictures into the new job. For this click on the button 'documents' upstairs in the job, then select the pictures by clicking on the 'Add files' button (1) of the window that opens in another window to select files. Select your photos and click 'open '. The files (pictures) selected will be listed in the window displayed above. When the list is complete, click the button (load files) (2). This will put them in the job.

2 with the app Inspector

If you have our App "Inspector" on tablet or smart camera, open the job on the Tablet by the "Search" button (enter the plate number of the vehicle or the file number) and choose the option "Edit". Shoot (take pictures of documents also!) and export information to PlanManager. Complete the PlanManager file with the description of the damage and always check the related parties: the owner, the driver, the insured (because it may be that the customer/owner already existed in PlanManager but that in the mission there was a fault of orthograph in the name which gave rise to the creation of a new customer/owner for example). Print and sign the customer repair agreement - click the button with the printer, and select the document in the menu drop-down:

III. There is an old job in PlanManager for this vehicle but not for this new damage.

This is so, an old job that deals more damage than those for which the customer comes in. In order to make things easier, you can click in the line of this file on an icon that allows you to create a new job by copying existing data (vehicle owner, driver, insured, insurer):

Reset	Export			Nev	w	60 items					
🌣 Filter			*		Job -	Location	Key Tag	Audatex	Creation Date	Book in date	Make
select a location	-		*	(D)	150060	Demo Repair Services			05-08-2017		
type a claim number		6	\mathbf{x}	đ	150059	All Car Repair	7	SW000026	16-07-2017	13-07-2017	vw
type a registration			*	Ъ	150058	Demo Repair Services			15-07-2017		MERCEDES-BEN
type a person name			*	ď	150057	Demo Repair Services		SW000002	19-06-2017		
			*	D)	150056	Demo Repair Services		SW000002	19-06-2017		

If you click, a new job will be created. Then you can proceed as described under point 2.

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